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## Assessment, Planning & Budgeting Chart

Southwestern Oklahoma State University

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## **HLC Accreditation Evidence Document**

**Title:**

**Source:**

**Summary:**

**SWOSU**<sup>TM</sup>  
Southwestern Oklahoma State University

# ASSESSMENT, PLANNING & BUDGETING CHART

## Governing Body Level

Regional University System of Oklahoma approves the university budget. Oklahoma State Regents for Higher Education provide oversight of state funds allocated to each institution. Both bodies meet with SWOSU representatives to discuss and provide guidance on assessment, planning, and budgets.

Vice President for Administration and Finance completes budget for upcoming year. After review by all stakeholders, the budget is approved by the university president and sent to the Regional University System of Oklahoma for approval.

## Administrative Level

Assessment through IPEDS Annual Report, Fact Book, enrollment trends, state funding trends, Assessment Committee, Retention Committee, Faculty Senate Executive Committee, Compliance Committee, Cabinet meetings, Strategic Plan Review Team, and other standing committee reports.

Planning through Strategic Plans, short- and long-term budgets, capital improvements, fundraising, civic engagement, legislative engagement, and retention and completion goals. Planning meetings with organizations and committees that include faculty, staff, student, and alumni membership.

Based on assessments, outcome goals, mission, and Strategic Plan, budget request and priorities are created for all departments in all areas. Discussions continue with all departments to ensure that mission of the university is considered in the budgeting and planning process.

## Department, College, and Director Level

Based on assessments, outcome goals, mission, and Strategic Plan, budget request and priorities are created and sent to Provost/Vice President for Academic Affairs.

Academic departments set Learning Outcomes, Program Modification, and priorities. Colleges set priorities and approve changes. Academic affairs set goals and priorities.

Programs complete assessment through Five Year Program Reviews, Accreditation Reviews, Annual Student Assessment Reports, and student evaluations.

**Academic Affairs**

Based on assessments, outcome goals, mission, and Strategic Plan, budget request and priorities are created and sent to Vice President for Student Affairs.

Student affairs departments set co-curricular outcomes, budget priorities, department modifications and department priorities.

Student affairs offices complete assessments of co-curricular outcomes, Drug Free Schools and Campus Act report, NSSE and SSI student surveys, and office reviews.

**Student Affairs**

Based on improvement plans, mission, and Strategic Plan, budget requests and priorities are sent to Vice President for Administration and Finance.

Departments set short- and long-term plans such as the campus master plan.

Departments complete financial and operational assessments of services such as financial aid, housing, institutional technology, food services, and bookstore.

**Business Affairs**

Based on assessments, outcome goals, mission, and Strategic Plan, budget request and priorities are created and sent to Vice President for Public Relations and Marketing.

Departments set short- and long-term plans such as the web site update, marketing goals, and media goals.

Departments complete financial and operational assessments of offices such as the Pioneer Cellular Event Center, Fine Arts Center, and PR office.

**PR & Marketing**

Based on assessments, outcome goals, mission, and Strategic Plan, budget request and priorities are created and sent to respective directors.

Departments set short- and long-term plans and goals for:

Human Resources
Institutional Advancement
Athletics
Business Enterprise Center

Staffing assessments and training goals  
Fundraising and alumni involvement goals.  
Athletic event participation goals.  
Business support goals.

**HR, Athletics, OIA, and BCEC**

### Guiding principles:

### Strategic Plan

**Mission:**  
*Southwestern Oklahoma State University supports students and community through its integration of effective teaching, scholarly and creative endeavors, and civic engagement.*

### Values Statement

### Vision Statement

### Strategic Goals

KEY:

Evaluation/Assessment

Planning

Budgeting